10/769,718 - **PROPOSED** AMENDMENT

<u>To</u>:   Examiner Wong

<u>Email</u>:   ███████████████

<u>Re</u>:   App. No. 10/769,718; <u>Proposed</u> Amendments to claims

<u>Comments</u>:

     Based on our telephone conversion on November 4, 2009, below are proposed claim amendments. The Applicant thanks the Examiner for his assistance.

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Listing of the Claims:

1.   (Currently Amended) A computer-based method for evaluating portfolio management, comprising:

interviewing a portfolio management industry expert thereby collecting:

A)   a weighting determined by said industry expert for each of a plurality of evaluation categories before asking evaluation questions associated with said evaluation categories, wherein said evaluation categories comprise categories of value chain steps and performance attributes, and

B)   responses from said industry expert to said evaluation questions, wherein said evaluation questions comprise groups of questions organized within each of said value chain steps and wherein some of said evaluation questions within said value chain steps are directed to said performance attributes and are interspersed across said groups of questions;

inputting said weightings and said responses into a computer analysis tool;

analyzing said responses to said evaluation questions in response to said weightings of said evaluation categories using said computer analysis tool for each of said value chain steps and said performance attributes; [[and]]

generating a computer generated analysis comprising:

a value chain analysis for each of said value chain steps comparing an aggregate response value corresponding to said responses to said evaluation questions within each value chain step to the weighting associated with each value chain step that is determined by said industry expert; and

a performance attribute analysis separate from the value chain analysis that is generated for each of said performance attributes comparing an aggregate response value corresponding to said responses to said evaluation questions that are interspersed across said groups of questions to the weighting associated with each

performance attribute that is determined by said industry expert, said interspersed evaluation questions thereby being included in both said value chain analyses and said performance attribute analyses; and

reporting [[a]]said computer generated analysis to said industry expert contemporaneously with an interview of said industry expert that comprises said interviewing step, said inputting step and said analyzing step, wherein immediate results are provided to said industry expert and wherein scenarios of said weightings and said responses are immediately comparable.[[;]]

~~wherein said computer generated analysis comprises separate analyses for each of said value chain steps and said performance attributes, wherein a value chain analysis is generated for each of said value chain steps comparing an aggregate of said responses to said evaluation questions within each value chain step to the weighting associated with each value chain step that is determined by said industry expert, and wherein a performance attribute analysis is generated for each of said performance attributes comparing an aggregate of said responses to said evaluation questions that are interspersed across said groups of questions to the weighting associated with each performance attribute that is determined by said industry expert, said interspersed evaluation questions thereby being included in both said value chain analyses and said performance attribute analyses.~~

2-7.   (cancelled).

8.   (Previously Presented) The computer-based method according to claim 1, wherein said computer generated analysis further comprises a value tree analysis, said value tree analysis grouping said responses to said evaluation questions from different categories of said evaluation categories into one of a plurality of measurement categories thereby combining said grouped responses into an effectivity result for each measurement category, wherein weightings from said industry expert for each of said measurement categories are not input into said computer analysis tool, said value tree analysis further comprising recommended solutions based on said effectivity result.

9-16.   (cancelled).

17.   (Currently Amended) A computer-readable medium storing a program, said program directing a computer to analyze an interview and report results by executing the steps comprising:

receiving a weighting input for each of a plurality of evaluation categories, said evaluation categories being categories of a portfolio management process and including at least value chain steps comprising profile assessment, asset allocation, asset selection, order generation, and reporting and monitoring and performance attributes comprising automatization, scalability, and outsourcing and insourcing;

receiving response inputs to evaluation questions, said evaluation questions being questions about the performance of said portfolio management process, wherein said evaluation questions comprise groups of questions organized within each of said value chain steps and wherein some of said evaluation questions within said value chain steps are directed to said performance attributes and are interspersed across said groups of questions, and wherein predetermined weightings of said evaluation questions are changeable on the same screen display that receives said response inputs;

analyzing said response inputs to said evaluation questions in response to said weighting inputs of said evaluation categories; and

generating a plurality of reports based on said analyzing step, said plurality of reports comprising:

reports for each of said value chain steps that compare an aggregate response value corresponding to said response inputs to said evaluation questions within each value chain step to the weighting input associated with each value chain step;

reports for each of said performance attributes that compare an aggregate response value for each performance attribute of said response inputs to said evaluation questions that are interspersed across said groups of questions with the weighting input associated with each performance attribute, said interspersed

evaluation questions thereby being included in said reports for both said value chain steps and said performance attributes; and

a value tree report comprising groupings of some of said response inputs to said evaluation questions from different categories of said evaluation categories into measurement categories thereby combining said grouped responses into an effectivity result for each measurement category, and comprising a list of key drivers or recommended solutions based on a comparison of said effectivity results and predetermined values for each measurement category; and

outputting [[a]]said plurality of reports ~~based on said analyzing step~~ comprising an automatic flag for each report identifying levels of improvement potential, wherein said report~~s are outputted to be~~ [[is]] reviewable contemporaneously with an interview of an industry expert, thereby providing immediate results to said industry expert and wherein scenarios of said weighting inputs and said response inputs are immediately comparable.[[;]]

~~wherein said reports comprise separate reports for each of said value chain steps and said performance attributes and comprises a value tree report;~~

~~said reports for said value chain steps comprise comparing an aggregate for each value chain report of said response inputs to said evaluation questions within each value chain step to the weighting input associated with each value chain step;~~

~~said reports for said performance attributes comprise comparing an aggregate for each performance attribute of said response inputs to said evaluation questions that are interspersed across said groups of questions to the weighting input associated with each performance attribute, said interspersed evaluation questions thereby being included in said reports for both said value chain steps and said performance attributes; and~~

~~said value tree report comprises groupings of some of said response inputs to said evaluation questions from different categories of said evaluation categories into measurement categories thereby combining said grouped responses into an effectivity result for each measurement category, and comprising a list of key drivers or recommended solutions based on a comparison of said effectivity results and predetermined values for each measurement category.~~

18-32.   (cancelled).

33.   (Previously Presented) The computer-based method according to claim 8, wherein said value chain steps comprise profile assessment, asset allocation, asset selection, order generation, and reporting and monitoring, and said performance attributes comprise automatization, scalability, and outsourcing and insourcing, wherein predetermined weightings of said evaluation questions are changeable in response to a determination by said industry expert, wherein each of said computer generated analyses comprises an automatic graphical flag identifying a level of improvement potential, further comprising collecting said responses to said evaluation questions thereby benchmarking said responses with responses to a same set of evaluation questions from another industry expert, and further comprising collecting responses from said industry expert to benchmarking questions, wherein said benchmarking questions cluster and segment a company of said industry expert.